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VEGETABLE Situation

ECONOMIC RESEARCH SERVICE • U.S. DEPARTMENT OF AGRICULTURE

THE VEGETABLE SITUATION

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Principal contributors
Charles W. Porter
Joseph Combs

Commodity Economics Division

Economic Research Service

U.S. Department of Agriculture
Washington, D.C. 20250

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SUMMARY

Fresh vegetables are in more generous supply this winter than a year ago because of increased acreage. There are substantially larger supplies of lettuce, and more broccoli, carrots, and celery. A smaller crop of Florida tomatoes will probably be augmented by a relatively heavy supply of Mexican imports. No serious shortages of the important fresh vegetable crops have shown up thus far this season. But onion stocks are not large compared with most other seasons, though they were 12 percent larger on January 1 than the short supply a year earlier. Grower prices for fresh vegetables are expected to move above those of the last quarter of 1973, though they may not reach the record high of last year.

The combined pack of *canned and frozen vegetables* probably was only moderately larger last season. But sharply reduced carryovers left the total supply this past fall probably no more than 2 percent above the relatively light quantity available in the 1972/73 marketing season. Considering 10 important canned vegetables, brisk demand is steadily working down a supply nearly equal to the tight quantity of a year ago. Stocks of frozen vegetables on January 1 were 5 percent more than the moderate amount available a year earlier. Supplies of canned and frozen peas, canned corn, and concentrated tomato products are in tightest supply.

Storage stocks of fall crop *potatoes* were 4 percent less than the small volume for the same date a year earlier. Supplies are tightest in the East, but fresh market prices have been steadily advancing in recent weeks in all the major production areas. High prices are expected at all levels through the spring months at least. Despite two seasons of relatively light supplies, processing use continues to gain. For example, processors in the leading States had used 14 percent more potatoes than a year ago to January 1. Stocks of all frozen potato products on January 1 were down 19 percent from a year ago, and there were 24 percent fewer frozen french fries. Trade demand is strong despite advancing wholesale prices.

Sweetpotato production fell slightly in 1973, at a time when fresh and processed demand was the strongest in years. Processors were unable to pack as much as the market could absorb, and supplies are

light. Wholesale prices for canned sweets are nearly a fourth or more higher than a year ago. These sharply higher prices will probably last until the new pack is made next fall.

The 17.6 million hundredweight (cwt.) supply of *dry beans* for sale in the current marketing season is approximately 9 percent less than the moderate figure of a year earlier. Continued strong export and domestic demand will pull carryover stocks to record lows by September. The January farm price of $32.50 per cwt. was without precedent, three times the $10.50 a year earlier. As a result, the estimated value of the small 1973 crop comes to $438 million versus $200 million for the larger 1972 output. At these prices, growers are expected to expand 1974 acreage even though high prices for other crops are also attracting additional acreage. *Dry pea* supplies are light, too. The December grower price of $27.50 reflects the small 1973 crop and the heavy export demand.

RECENT DEVELOPMENTS AND OUTLOOK

FRESH VEGETABLES

Although the acreage of U.S. winter vegetables is 11 percent larger than the reduced 1973 planting, potential production may be only 4 percent more than last year. This assumes average yields per acre, and is not a production forecast based on current yield estimates. Much of the broccoli crop will probably be frozen commercially. Current trade reports note heavy lettuce shipments and low prices out of California and Arizona. Ample supplies and low prices are expected to continue into the early spring. Thus far, adverse weather in Southern California has not curtailed lettuce supplies. Carrot and cabbage crops in South Texas were reduced by a severe December freeze. Some acreage there was not harvested.

Onion stocks on January 1 were 12 percent more than the short supply on hand last year, but 10 percent less than the same date in 1972, a more normal season. Spring onion acreage in Texas is estimated the same as last year, but heavy rains at planting time delayed planting schedules, thereby averting potential damage from the December freeze. With normal weather and no further cold damage, initial harvest currently is expected to be a couple weeks late, but peak a little earlier than usual in early April. As a result, March and early April supplies will probably be on the tight side again this season.

In marked contrast to many other foods, fresh market vegetable prices received by growers averaged moderately below a year earlier in the September 1 to January period. Generous supplies of lettuce, carrots, and celery have been largely responsible, and none of the other major vegetables have been in really short supply. With supplies of onions tightening up, and taking the usual seasonal factors and rising costs into consideration, it is probable that fresh market vegetable prices to growers will move upward and be closer to the record high prices reached in the early part of 1973. Retail prices were also lower in the last quarter of 1973, and were only slightly above 1972. For the first quarter of 1974, retail fresh vegetable prices may hold fairly close to or barely lower than the same period of 1973.

Prospects for leading items

Lettuce—Growers anticipate a winter lettuce harvest potentially a tenth more than 1973. This increased output is expected from a 24 percent increase in California and Arizona acreage. Generous supply will keep the trade's price structure lower than the comparable winter and spring experience of 1973. A return to a more familiar pattern of retail prices in recent months may have acted to keep lettuce on its modest but upward consumption growth track. Shipping activity would indicate few or no significant problems in moving lettuce in volume to key terminals.

Florida plantings of iceberg amount to one-half of the State's winter lettuce acreage, a substantial gain from 1973. Other Florida lettuce acreage is smaller this winter, although the combined lettuce-escarole output should total slightly higher than last year. Arizona's Yuma District will continue harvesting through the first week of spring. Growers and shippers there will be working off an estimated 4,100 acres more than in 1973, a 44 percent larger area for harvest.

With the increase in U.S. lettuce production potential, prices in any one district may react less sensitively to inadequate growing or harvest conditions in other areas. Generally, low prices can be expected the next several weeks, barring unusual weather in both California and Arizona.

January f.o.b. prices at Arizona and California points were unusually low. Indeed, El Centro shipments at $1.44 for the standard carton of 24 heads left only a narrow incentive for growers to harvest. These prices have held relatively steady at these low levels.

Cabbage—Grower prices for cabbage in Florida, Arizona, California, and Texas led off 1974 just slightly higher than a year earlier. But heavy shipping from Florida much of January pushed prices well below a year earlier. A good volume of

fresh market stock was diverted to sauerkraut, as field growth was two weeks ahead of normal.

Shipping activity from Upstate New York is supplementing the shipments from other sources. Stocks of cabbage Upstate were 495,000 cwt. on January 1, 1974—up over 40 percent from the abnormally low inventory at the opening of 1973.

Florida and California cabbage acreage increases should, in part, act to offset the smaller acreage and unfavorable growing conditions affecting Texas production. Based on past production performance, 1974 potential production of cabbage will be down 10 percent from 1973.

Carrots—The U.S. winter carrot crop is estimated at 22,100 acres, 9 percent above 1973's figure. Potential production may register a nearly equal gain, to 4.1 million cwt., or up 8 percent. In the Lower Rio Grande Valley, Texas, master containers of 48 l-lb. film bags of carrots were moving in mid-January at $4.50, close to the 1973 price. Late in 1973 and in January 1974, unloads were moderately lower at the 41 principal destinations. However, peak activity in Kern County, California, in January was not expected to compensate fully for the cold-damaged crop in many Texas areas. As a result, prices strengthened in Texas and California during January, but weakened toward the close. Supplies are nevertheless expected to be generous during the winter and spring.

Celery—Current grower prices of celery, sharply lower than a year ago, reflect for the second year in a row an estimated expansion of production. Celery winter acreage, chiefly in California and Florida, jumped 1,000 acres from 1973 to 9,000 acres. Compared with 1973, f.o.b. prices are holding about 40 percent lower. The quality of this winter's celery is good to very good, and an easing in its retail price could enhance its popularity among all consumers.

Onions—The Texas spring onion crop is estimated at 19,500 acres for harvest, the same as in 1973. Heavy rains at planting time delayed planting schedules, thereby averting potential damage from the December freeze. With normal weather and no further cold outbreaks, initial harvest is expected to be a couple weeks late but peak a little earlier than usual in April. Should this situation develop, March and early April supplies will probably be on the tight side again this season. Trade sources expect Mexican imports to be roughly equal to a year earlier. Initial supplies from Tampica became available February 1.

Onion stocks on January 1 were 4.5 million cwt., an increase of 12 percent from 1973's very short supply. Stocks in Idaho increased by the largest volume and onion supplies in New York were larger too. These output and storage estimates suggest that with a comparatively tight supply on onions, grower prices in winter 1974 will probably average moderately below 1973 levels but will certainly proceed upward, according to the manner in which inventory is drawn down. Prices in the West are very high and are above a year ago in that region. An additional and important element of uncertainty in the outlook for storage onion supply and prices is whether export volume will be increased during the first quarter of 1974.

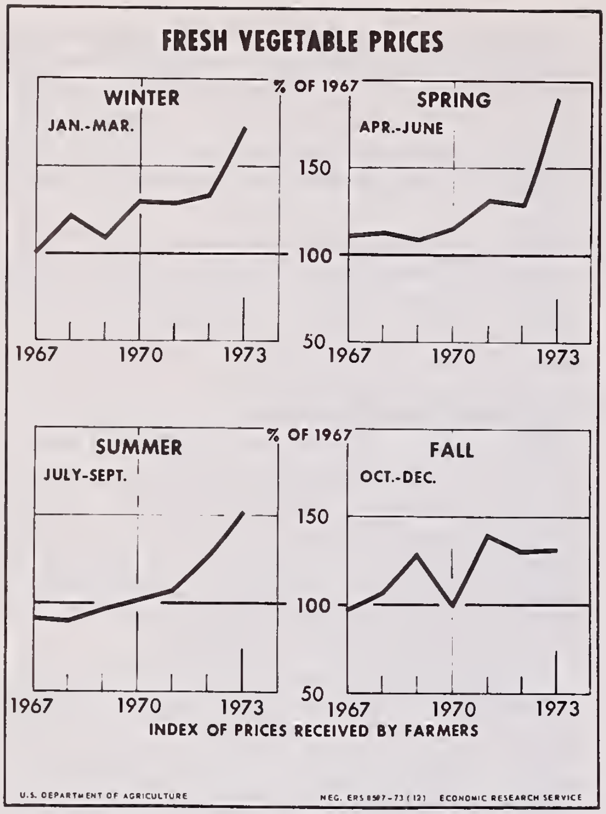
Onion prices moved upward during January in all regions. In Western and Central New York, a price of $3.85/50-pound sack of Yellow Globes opened 1974, about $1.21 below 1973. During the month of January these prices approached $6.00. Michigan year-to-year comparisons show a similar price relationship but with prices lower than in New York. Yellow Spanish onions from Western Idaho and Malheur County, Oregon, moved up sharply during January, as shipments to Japan have strengthened prices. Shipping-point prices for 3-inch yellow Spanish moved from $3.88 to $7.90 in January. These Pacific Northwest f.o.b. prices can be expected to hold firm to strong at least until further indications of the early spring Texas crop are available.

Tomatoes—Winter quarter acreage of tomatoes in Florida is 2,000 below last year, a drop of 16 percent. Based on historic average yields, production may total 1,459,000 cwts., an 18 percent drop from 1973. This prospect for the U.S. tomato market would seem likely to invite further Mexican imports. After mid-February, Florida volume is expected to taper off, and Mexican supplies probably will continue to account for an increasing share of the market through most of March. A trade source noted that staked tomato acreage in the Cubiacan Valley of Mexico was 20,450 acres compared with a little more than 25,000 a year earlier. This acreage difference may or may not be reflected in the level of shipments to the United States because the Mexican industry probably did not ship all they could have last season. As of mid-January, Mexican shipments were 15 percent heavier than in the comparable period a year earlier.

Prices at Nogales (Arizona) and Florida points fell as Mexican shipping tempo picked up. Greens from Florida were bringing 17-21 cents/lb. and breakers and riper from Mexico were worth 19 cents/lb. at Nogales later in January.

Slightly More Fresh Vegetables in 1973
Value Up Substantially Again

With about 1 percent more harvested acreage (excluding melons) and with better yields, fresh vegetable production in 1973 moved 2 percent above a year earlier. Output increased for all the major vegetables except tomatoes. Also, a small portion of what is reported as fresh goes into processing channels.



The 22 principal vegetable and melon crops had a value of $1.84 billion, 15 percent above a year earlier. Leading crops in order of value were lettuce, tomatoes, and onions, whose combined total accounted for 47 percent of the reported figure.

The 5 leading States in fresh vegetable production were in order: California, 40 percent; Florida, 15 percent; Texas, 10 percent; Arizona, 5 percent; and New York, 4 percent. These States accounted for 73 percent of the U.S. vegetable tonnage in 1973 and 76 percent of the total value.

The Index of prices received by growers for fresh vegetables was again record high, 162 (1967 = 100). The 1972 figure was 131 and 1971 was 127. Onion and lettuce prices the early part of the year were very high, but from September to the end of the year, grower prices averaged slightly less than a year earlier.

Fresh Vegetables Imports Up Again

Except for a pause in 1971 and 1972, fresh vegetable imports have trended upward in recent years, and 1973 was no exception. Total import volume for 1973 exceeded 1.5 billion lbs., almost a third more than 1972. These vegetables are practically all of Mexican origin marketed here in the first 6 months of the year. Onion imports from Mexico rose dramatically during March and April as domestic storage stocks were exhausted before the Texas harvest commenced. Substantial gains in tomatoes, peppers, cucumbers, and eggplant were noted as well. Tomatoes, however, do account for roughly a little more than half the total volume.

Further increases in import activity may be expected even though 1974 may not show much further gain. The increased shipments of 1973 reflected strong demand for fresh vegetables coupled with rather light domestic supplies the early part of the year. In early 1974, domestic supplies are a little larger with demand about as strong. But in the long run, the winter imported items have a competitive edge, due to lower labor cost and less freeze risk.

PROCESSED VEGETABLES

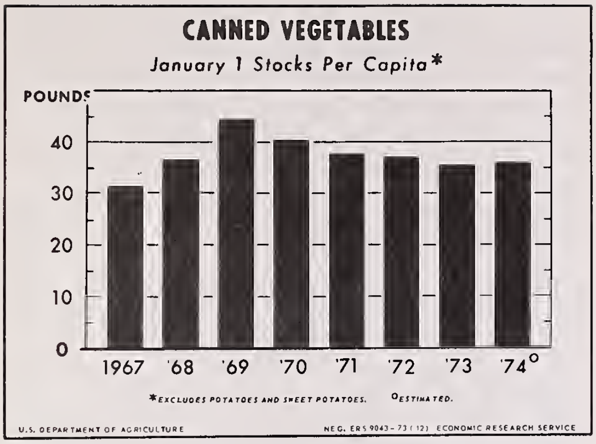
The combined pack of canned and frozen vegetables apparently was moderately larger than last season. But the sharply reduced 1973 carryover left a total supply about 2 percent more than the relatively light supply available in the 1972/73 marketing season, and slightly less than two seasons earlier.

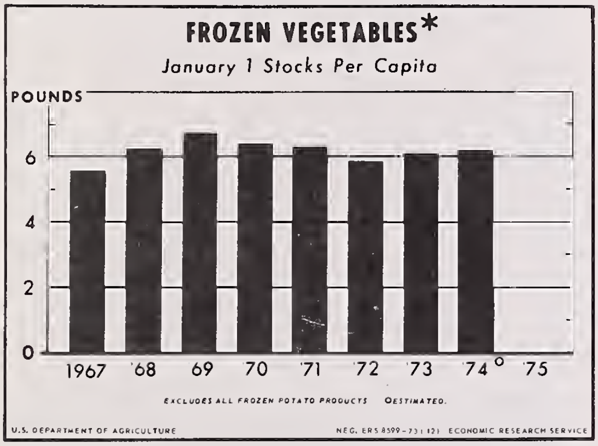
With a meager carryover, and a moderately larger pack, supplies of 10 important canned vegetables for 1973/74 should be about the same as for 1972/73. This estimate takes into account snap and lima beans, beets, sauerkraut, corn, peas, pickles, peeled tomatoes, tomato juice, and tomato puree, but excludes catsup, tomato paste, and tomato sauce. To cope with the heavy demand for canned goods, packers are prorating orders with buyers not receiving 100 percent of their needs for many items. Some can sizes are turning out to be in short supply as well. Canned peas are in especially light supply, and the sweet corn pack is less than forecast earlier too. Concerntrated tomato products are also reported in tight supply. The substantially larger pack of snap beans is being readily acquired by the trade. Government offers to buy canned vegetables are receiving scant interest or are even being ignored this year. Trade interest in Government needs is often a good indicator of market conditions.

The outlook for frozen vegetables parallels the canned situation somewhat. Stocks of all frozen vegetables on the first of January were 5 percent more than the moderate supply on hand a year earlier. Disappearance of frozen vegetables has continued heavy and most of the price pressure is on the upward side.

Higher Prices - Replacement Supplies to be More Expensive

Because more liberal cost passthroughs have been allowed since September 10, prices of processed vegetables are rising more in this season than in 1972/73. For much of 1973, prices of processed





vegetables moved up less than fresh. These relatively attractive prices helped stimulate rapid movement of processed goods. Furthermore, some wholesale buyers and many consumers felt that replacement purchases would be made only at higher levels, giving further encouragement to shipping activity. Advanced ordering is a major consideration affecting the market at present. Continued relatively high meat prices and the need to stretch family food budgets will continue to favor the heavy use of processing vegetables.

Despite strong demand, wholesale list prices for invididual processed vegetable items are moving up in small steps, in sharp contrast to the more volatile fresh market vegetable price movement. As a result of tight processed supplies, processors' policies are to allocate supplies to customers who may have attemped to book more than their normal requirements, especially in these times of tight supply. Allocation tends to keep at least some volume moving through supply pipelines during the entire marketing season.

Processing Crop Review

U.S. production of 13 processing vegetables gained 4 percent over 1972, and their value at the packinghouse door rose 15 percent to $629 million. Harvested acreage for nine principal commercial vegetables was 9 percent above 1972, but lower average yields accounted for the relatively small production gain.

The largest production gains were in beets, carrots, and snap beans, and only four crops—peas, asparagus, broccoli, and cauliflower—came through with reduced tonnage in 1973. The 3 percent larger sweet corn production was a disappointment, and only 2 percent larger tomato tonnage has resulted in tight supplies of many tomato products. Tomato tonnage in 1973 accounted for 52 percent of all processing vegetable tonnage.

Processing vegetable yields in many sections did not come up to performances of past years. For example, the average tomato yield in California dropped from 25.3 tons per acre in 1972 to 22.3 in 1973. Tomato yields were below par elsewhere too. Adverse weather pushed yields of peas in Idaho, Oregon, and Wisconsin below a ton per acre this past season. Wisconsin also has some misfortune with snap bean and beet yields as well. In general, lima and snap bean yields were good.

Freezing Vegetables Make Good Gains

Between 1971 and 1973, 29 percent more tonnage of five major vegetables—lima beans, peas, spinach, snap beans, and sweet corn—had been frozen. In the same period, canning tonnage of these items held roughly the same. This comparison suggests keen consumer competition between the two forms of processing, and that where the frozen form is available, it is gaining ground. Canned snap beans are bucking this trend, and of course, some other items excluded from the above comparison must be taken into account. Continued increased tonnages of pickles and tomatoes largely account for total gains made in the canned vegetable sector. On the other hand, carrots, onions, broccoli, and cauliflower have become important frozen vegetables in recent years.

Prospects for Leading Vegetables

Snap Beans—Preliminary data show a record 1973 pack of green and wax beans. A record tonnage of green beans came from Oregon. But the total supply of 60 million cans of 24/303's for the current season was not the largest on record due to the smallest carryover in several years. In the first few months of the current marketing season, shipments were running almost a fourth larger than a year earlier. Buyers seem concerned about processed vegetable supplies as well as the prospect of higher prices for replacement stocks. As a result, the potentially large supply of beans has already left canners' hands. November 1 stocks were only 7 percent more than the tight supply on hand the same data a year earlier and

were substantially smaller than any other recent year. Wholesale list prices range from the same as a year earlier to sharply higher, depending on style of pack and can size. Most items are substantially more expensive this year.

Although the 1973 pack of 240 million lbs. of frozen green snap beans turned out to be slightly less than in 1972, stocks on December 1 were substantially larger than a year ago and well above most other recent seasons. Nonetheless, wholesale prices are firm, reflecting the generally tight supply of all processed vegetables. These larger frozen snap bean supplies will support steady gains in use.

Sweet Corn—Moderately reduced yields from larger sweet corn acreages in 1973 resulted in a total pack of 55 million cases. However, this amount was not enough to boost the total supply above the 1972/73 selling season. As with snap beans, movement through trade channels has been brisk, so that canners' stocks reported on December 1 were 8 percent smaller than a year ago. Wholesale prices have been moving up gradually as it is likely that supplies will again be cleaned out by the end of the current marketing season.

The combined pack of frozen cut and on cob corn was record large in 1973. On cob corn production continued to grow as the pack of 161 million pounds was a fifth larger. Cut corn production moved back to nearly 300 million pounds in 1973—below both the 1967 and 1968 seasons. The frozen corn industry is moving West, with that region accounting for larger shares of the pack in recent years. Total stocks of frozen corn on January 1 were substantially larger than most recent seasons, but were still smaller than the 1968/69 or the 1969/70 season. Wholesale prices have advanced only slightly since the new marketing season began. Despite the seemingly generous supply, trade reports note that only limited supplies are available for spot sale.

Peas—The 1973 pack of canned peas was off sharply. In fact, it turned out to be one of the smallest on record. December 1 stocks were sharply less than for any recent year. January 1974 prices for Midwestern and Eastern sweet peas were about 15 percent higher than a year ago. As with other vegetables, buyers know that higher field costs in 1974 will mean higher pack prices for the coming season. Movement through trade channels is heavy, considering the available supply. Up to December 1, a moderately larger volume had left canners' hands than a year earlier when supplies were more generous.

The frozen pea pack fared somewhat better in 1973, as a larger acreage moderately offset reduced yields. The 1973 pack was substantially more than in 1972. An even larger quantity could have been marketed this season, considering the modest January stocks of other competing items. January stocks of 178 million pounds were 6 percent larger than the limited quantity available the same date last year. According to trade reports, practically none is available for spot sale. Prices are firm at levels moderately higher than a year earlier. Early January institutional pack prices of 20.3¢ per pound compared with 19¢ a year earlier.

Tomatoes—The total tonnage of tomatoes available to the canning industry was only 2 percent more than in 1972. This tonnage resulted from a 7 percent larger tonnage in California that offset smaller crops in the Midwest, especially Ohio. The East wound up with 10 percent more than the storm-damaged 1972 crop. This limited supply of raw product resulted in smaller packs than the industry probably had planned at the beginning of the season.

California, where 82 percent of the U.S. tonnage originated in 1973, showed an 8 percent larger pack of canned tomatoes. Despite this increased pack, the 1973/74 canned tomato supply will not be large, probably reasonably close to the modest quantity available the previous season. A low U.S. carryover and probably a smaller pack outside California make this true. Wholesale prices are about 10-15 percent higher than a year ago. Tomato juice supplies probably still are on the tight side, although the U.S. pack was up substantially over the reduced 1972 figure. Most of the gain came from California. January list prices outside of California were reported sharply higher than a year ago; juice prices in that State were only slightly above January 1973.

Based on partial data, there were indications of larger packs made of catsup, paste, and chili sauce. However, trade demand for practically all tomato items is very strong, and there is no doubt that at least moderately larger packs of all items will be needed in 1974 if there is to be an adequate supply.

Bargaining activity in California has been going on since October, but as of mid-January little contract signing was taking place. Current offers of $48.00 per ton plus $7.50 for early- and late-season delivery are sharply above the previous season.

Beets—With the tonnage of beets more than a fifth larger this past season, the July to November 1973 pack of 9.3 million cases replenished sharply depleted stocks. Even so, November stocks in canners' hands were only 9 percent more than the meager quantity on hand a year earlier and 34 percent less than in November 1972. Shipments from canners between July 1 and November 1 were a fourth larger than a year earlier. This brisk demand has helped push prices 15-25 percent above a year earlier, based on January listings.

Lima Beans—The combined pack of frozen Fordhooks and frozen baby limas probably was at least slightly larger than a year earlier since production of limas for freezing was estimated at 5 percent more than in 1972. But with the smallest

carryover since 1960, total stocks on January 1 were about equal to the small quantity available a year earlier. Fordhook stocks were so light that they will probably be exhausted before the 1974 pack is made. Baby lima supplies are more adequate for trade needs, as stocks were well above the levels of the two previous seasons, though sharply less than in the late 1960's. Wholesale prices for both varieties advanced moderately in the fall and have held firm since that time.

The 1973 canned pack of 3.2 million cases was almost 50 percent larger than the short pack of 1972. But, with a negligible carryover, November stocks were still below the level of most recent years, and only 6 percent more than in 1972. Prices for nearly all can sizes are about $1.00 per case higher than a year ago. However, unusually high prices for dried lima beans should encourage some increased use of canned and frozen limas.

Sauerkraut—Packers used about a tenth more contract and open-market cabbage tonnage this season. Planted acreage was up sharply, but yields were much lighter than in 1971 or 1972 in nearly all producing sections. Kraut stocks on January 1 were 6.3 million cases, 5 percent less than the small quantity on hand a year earlier. January 1974 wholesale prices were about 20 percent higher than a year earlier and 50 percent above January 1972. Stocks will probably be nearly depleted by August 1, the carryover date.

Spinach—With a 5 percent larger spring pack of frozen spinach and with additional activity this fall, spinach stocks on January 1 were a third larger than a year earlier, and were well above most recent seasons. The fall spinach pack, while not normally a large one, reflects the 26 percent larger fall crop of 1973. With frozen spinach in reasonably good supply, prices held generally steady throughout 1973. No doubt, strong demand and rising prices for other canned and frozen vegetables have helped to maintain price levels.

The canned spinach pack for 1973 was not much less than a year earlier. October stocks in 1973 totaled 3.1 million cases, compared with 3.6 million a year earlier.

Broccoli—Processing tonnage for freezing in 1973 was sharply less than a year earlier and moderately below 1971. As a result, current stocks are 19 percent less than a year earlier. Wholesale prices have been advancing since last summer. California processing activity is expected to resume in March.

Additional Processed Items

Production of *cucumbers* for pickles was 7 percent larger than in 1972, as this market seems to grow gradually each year. Up to the first of November, a 16 percent larger *frozen carrot* pack was made, and stocks once again moved above a year earlier. There has been strong demand from commercial dinner manufacturers plus some export interest to the Japanese market. *Frozen cauliflower* stocks are much larger than a year earlier, but recent price advances suggest new interest in this vegetable. In contrast, *frozen asparagus* movement seems to be lagging. The available supply this season was a fourth less, and the disappearance between April 1 and December 1 was down 35 percent from a year ago.

Foreign Trade Picking Up

Foreign trade in processed vegetables has not usually been an important part of the demand picture, except for our imports of tomato products. However, 1973 was marked by an upsurge in export shipments. In the July 1 to December 1 period, exports of canned vegetables were 118 million pounds, compared with 72 million a year earlier and only 46 million in 1971. Two devaluations of the dollar and increased purchasing power abroad have made increased exports possible in many instances, such as sales of canned corn to Japan and West Germany. Shipments of canned tomatoes to Canada have made steady growth in the past few years.

July 1 to December 1 imports of canned vegetables dropped 11 percent below a year earlier. This drop was mainly due to declines in most of the leading import items such as tomatoes, tomato paste, and pickles. Specialty canned vegetable items, on the other hand, showed some increase.

Frozen vegetable exports practically doubled from July 1 to December 1, 1973. Much of this gain was in frozen french fried potatoes to Japan, although the Japanese have been buying an increasing variety of other frozen vegetables.

POTATOES

The 1973 fall crop was the second consecutive year of reduced production. The 252 million cwt. output was only 1 percent more than 1972, but 5 percent below 1971. Continued heavy use by processors, and high prices for competing foods have helped to keep demand very strong. Production for the entire year, 297 million cwt., was also slightly ahead of the small 1972 crop but was 7 percent below 1971.

Disposing of the 1973 Crop

Use of table stock potatoes in calendar year 1973 fell in both absolute and per capita terms. Per capita fresh use in 1974 may register below 52 pounds, roughly 4 pounds lower than in 1972. Lighter than usual output 2 years in a row plus strong demand helped push 1973 average prices received by growers to nearly double the levels in the 1966-71 marketing seasons. Most of this reduced supply showed up as

reduced fresh market sales with record high retail prices. With the shorter supplies, livestock feed and starch uses fell sharply as well.

Use of processing potatoes has increased, despite the smaller supplies of raw stock. As of January 1, 1974, seven key processing States reported more than 48 million cwt. of the 1973 crop used for processing, up a substantial 14 percent from the quantity used 1 year earlier. The most recent rapid growth in processing has resulted from sharply higher output of dehydrated potatoes, the increasingly important basic product used to make restructured chips and extruded french fries. Chippers have been using slightly less raw product as the industry has been squeezed by high prices of oil and potatoes. Canners used about the same amount of the crop as had gone to canning the year before. In terms of raw product quantity used, potatoes earmarked for dehydration may soon edge ahead of chip manufacture from whole potatoes.

Food Use Steady Despite Higher Prices

The full significance of the pattern of crop use in the 1973 season can be seen in the potato's per capita consumption stability—despite moderately to sharply higher prices for all forms. Even if output of potatoes is increased moderately in 1974, wholesale and retail prices will likely be "sticky on the downside"—due in part to more rapidly rising retail prices for macaroni products, rice, and dry beans. Rising incomes and current eating preferences suggest a firmer market environment for potatoes than in earlier years. These factors, of course, will continue to underlie the growing acceptance of processed potato products.

Fresh Market Price Review

Potato growers, especially those with fresh market outlets, are participating in one of the highest priced seasons on record. January 1 stocks were 4 percent smaller than a year ago. This has certainly attracted the attention of growers and other commodity market participants alike. F.o.b. prices from Twin Falls, Idaho, throughout the fall (mostly $7.00-$7.25/cwt. for U.S. #1 Size A Russets) moved up to $9.25 per cwt. during mid-January. Such a movement "ironed out" in part some of the difference between spot and futures prices on the New York and Chicago Exchanges.

Other representative f.o.b. prices included $8.25 per cwt. (U.S. #1 Size A Russets) at Madison, Wisconsin, and in the San Luis Valley, Colorado. In Maine, prices pushed almost to the $8.00 level. However, U.S. #1 Size A Round Whites were judged in somewhat shorter supply than the Northwest's Russet crop. In fact, the larger storage total reported for January 1, 1974 in Yakima Valley, Washington, mostly offsets lower totals in Idaho.

Shipment records indicate a tight supply situation. Unloads to 41 key terminals from the beginning of October through January were 10 to 12 percent below total activity recorded in the comparable 1972/73 span. However, heavier loadings per car are commonly reported this year.

Frozen Pack Activity

In early November, the American Frozen Food Institute reported January-June 1973 U.S. pack activity. During this period, 1.31 billion pounds of potatoes were packed to frozen potato products, up 1 percent from the first half of 1972. The Pacific Northwest reestablished its commanding lead in frozen products, set back only in 1972, by producing more than three-fourths of the U.S. total. The industry wasted no time in packing a record 0.9 billion pounds of food-service french fried potatoes—up 4 percent from the year before. In complementary fashion, the size of the retail pack was off by 14 percent to 0.25 billion pounds.

Some of the frozen food industry's activity last year could be explained by continued growth in consumer spending at fast food stores and the intentions of many retailers to enhance their own sale of french fries, a high margin item. On the other hand, the late fall 1973 and winter 1974 decline in travel-related retailing (especially on Sundays) has certainly been felt in the commissaries supplying french fries to highway-dependent eating places. Whether the industry quickly adjusts either total pact activity or the mix between retail and institution food-service sizes depends in part on the frequency of away-from-home eating and the maintenance of fast food preferences even if the menu is prepared at home.

Retail Prices Compared

One year ago, the *Vegetable Situation* pointed out that the differences in retail prices on a cost per serving basis between fresh and processed potatoes had been narrowing. Prices for fresh potatoes, which usually have been the least costly form to use, have been rising much more rapidly than prices for frozen or dehydrated. For the home user, fresh potatoes now

Retail potato price trends

Year	U.S. averages		
	Fresh 10 pounds	Frozen french fries 9 oz.	Dehydrated mashed 7 oz.
	Cents	*Cents*	*Cents*
1967	74.7	15.0	36.3
1970	89.7	16.6	39.1
1971	86.1	16.3	40.1
1972	92.6	16.6	40.7
1973	136.8	17.2	42.7

BLS data.

are less clearly the economical choice when it comes to comparing cost per serving.

Prospects for Winter and Spring

The January 9 Crop Report forecast the 1974 winter potato crop at 2.5 million cwt., down 12 percent from 1973's 2.9 million cwt. Principal output reduction is anticipated from Florida.

Spring plantings of potatoes are estimated at 103,200 acres, 3 percent above 1973. Crop area is up in California, Arizona, Alabama, and Texas. Among the more important spring-planting States, only North Carolina and Florida may have smaller acreages. Grower adjustments of acreage intentions (either up or down) may further reflect increases or decreases in the processing requirements (chiefly for potato chips) within those States' trading areas.

On April 10, SRS will indicate spring yield and production. If yields hold close to normal averages for the States estimated, potato supplies (nearly all destined for fresh and chipping use) may increase moderately compared with 1973.

Stocks Down Moderately-Supply Tight

Potato stocks on January 1 were 4 percent less than the relatively light supply on hand a year earlier. To provide some meaningful measure of the current tight supply position, stocks are at levels comparable to those of the middle 1960's when processing activity was much smaller than today.

Stocks are the lightest in the Eastern States, with a remaining supply of 25 million cwt., 12 percent less than a year earlier. By the first of January, stocks in the Central and Western States had moved slightly below a year earlier as processing activity held at peak levels through the holiday period. In other seasons, several processors usually shut down during the holidays. Among the major producers west of the Mississippi, Washington, Oregon, and North Dakota report larger stocks than last season.

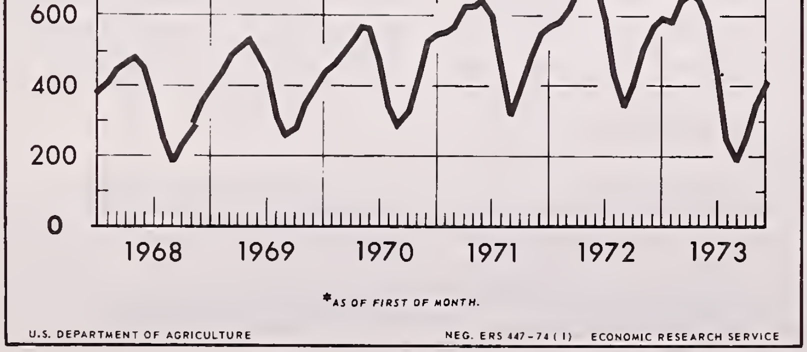
Table 1.—Potatoes: January 1 total stocks by areas, United States

Year	Eastern States	Central States	Western States	Total[1]
	Mil. cwt.	*Mil. cwt.*	*Mil. cwt.*	*Mil. cwt.*
1968	43.6	28.1	67.5	139.2
1969	40.4	28.7	61.3	130.4
1970	37.0	28.0	73.2	138.1
1971	38.0	29.9	82.0	150.0
1972	38.0	34.1	79.3	151.4
1973	28.0	27.6	78.8	134.3
1974	24.6	27.2	77.1	128.9

[1] May not add to total due to rounding.

French Fries Inventory

In the 1973/74 marketing season, the U.S. inventory of frozen french fried potatoes can be expected to peak by May 1. The *Cold Storage Report* dated January 17 showed an inventory of 451 million pounds of frozen french fries, down from the 594 million pounds at the open of 1973. Wholesale prices were advanced by 1 cent per pound (to 20 cents) by some segments of the trade this winter. Should the 1974 utilization of french fries be equal to the past year, the October 1 carryover stocks would be smaller than either of the unusually low 1968 or 1973 levels.



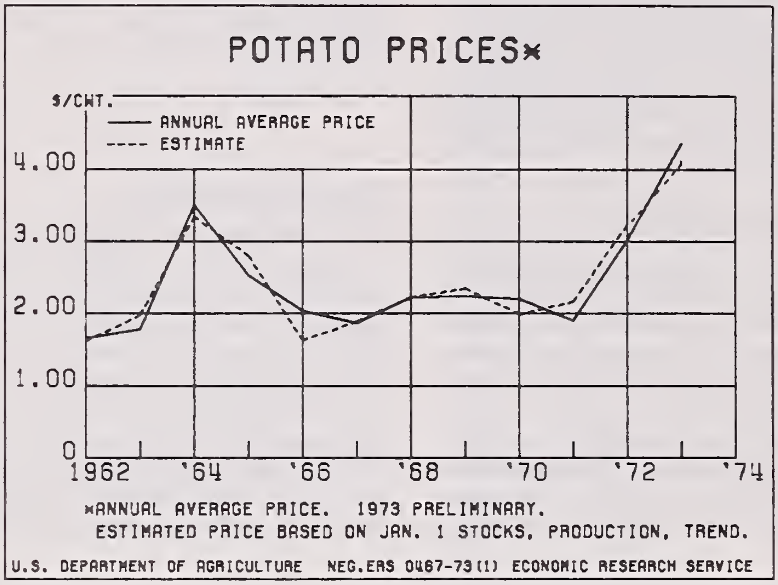
USDA Purchases

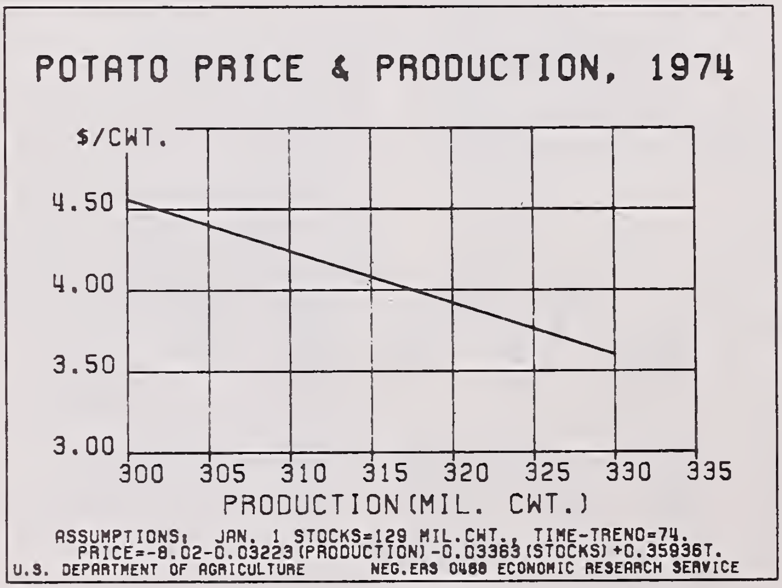
During September through December 1973, the Department of Agriculture did not purchase any dehydrated potato products for food distribution programs, compared with a buy of over 7 million pounds of flakes and granules in 1972. Also, USDA purchased only 3,240,000 pounds of frozen french fries thus far this season, compared with 25 million pounds September-December 1972.

Outlook for Supply-Price Behavior

The history of annual output, January 1 stocks, and overall time trends suggests several important relationships between supply and price. For 1974, if one supposes a U.S. output of 300 million cwt. (virtually the same as in 1973), then the year's average of monthly grower prices would be in the $4.50-$4.75 per cwt. range. Such a figure would be a climb of around 6 percent from 1973's average. On the other hand, the more likely response of growers in 1974 will be an expansion of acreage, dependent on the availability of inputs such as fertilizer, fuel, and industrial goods. Expansion of acreage may be accompanied by a return to average yields in many regions.

An output of 315 million cwt. of potatoes is not an impossible or unlikely grower objective for 1974,





should growing conditions improve modestly in the key States producing fall crops. If output does increase, prices to growers could retreat from their 1973 highs, but not by much—a decline to slightly above $4.00/cwt. would represent an 8 percent drop in the average of monthly grower prices. Grower receipts, of course, would fall by a slightly smaller percentage.

Of particular interest to growers and processors in precontract weeks is the expected relation between fourth quarter supplies and fourth quarter prices in 1974. Again, statistical analysis of fourth quarter production histories, January 1 stocks, and time trends reveals several supply-price dimensions. In 1973, fourth quarter output was 252 million cwt., and the average of monthly grower prices reported by the Statistical Reporting Service was $3.29.

For fourth quarter 1974, an output equal to 1973 would yield a price increase to around $3.60, up 10 percent from 1973. Larger output is more likely, however, and fall crops of 265 and 275 million cwt. could produce average monthly prices of $3.25 and $3.00, respectively. These fall 1974 production-price relationships assume no change in total national output prior to the fall estimate, as compared with 1973. Another assumption, and one for which there is a diminishing degree of certainty, is that the relative prices of potatoes and substitute foods will remain unaltered. In recent months, substitutes such as rice, durum wheat products, and others have been charting rather independent price courses.

Some of the above price indications may, in fact, be required in 1974 to make available credit, fertilizer, and other inputs to potato growers. Further enlargement of the crop depends on alternative crops as well, with wheat a key consideration in dozens of counties. Finally a larger supply would act to assure growers and processors that most usual trade needs would be adequately filled.

SWEETPOTATOES

Sweetpotato production fell slightly in 1973 to 12.4 million cwt. The U.S. average yield was the same as a year earlier, but about 1,000 fewer acres were harvested. Production in Louisiana and North Carolina, the two leading States, was off this year, and gains in Virginia, Mississippi, and California were not completely offsetting.

Market Trends

With a smaller crop, and with higher price levels for practically all foods, grower prices at the beginning of the 1973 marketing season (September-October) began sharply higher than a year earlier, reaching a record high. The December price was $8.11 per cwt. compared with $6.66 the same month of 1972.

According to data on unloads and shipments, fresh market movement lagged that of a year earlier. By the end of 1973, new crop unloads were moderately smaller than the same 1972 period. Movement from Louisiana was sharply less, reflecting the small crop plus substantial processing activity. North Carolina, Virginia, and California have made heavier shipments to the fresh market thus far this season.

Fresh market shipping point prices are high. For example, in mid-January, eastern North Carolina was quoting $7.00 for a 50-pound carton of washed and waxed Porto Ricos. This price compared with $4.88 a year earlier. Louisiana prices were $7.52 and $5.66, respectively, for similar types of sweets.

The 1973 canning season started more slowly than previous ones, even though the carryover was the smallest on recent record. However, by the first of December, the pack of 10.9 million cases was 17 percent more than the previous year. Also, December 1 stocks were larger than a year earlier when supplies were light.

Wholesale prices for most canned packs are running nearly a fourth or more higher than a year earlier. With the new pack season some months away, these strong prices are expected to hold, and 1974 processor demand promises to be very heavy.

MUSHROOMS

The mushroom trade, especially processors and distributors of canned mushrooms, faced a difficult marketing year entering 1974. Several recalls of the product in 1973, occasioned in part by engineering differences in new packing equipment, have perhaps temporarily diminished retail enthusiasm for canned mushrooms.

Recalls, however, are not expected to be detrimental to further long-run growth in consumer utilization of mushrooms. For U.S. mushroom growers, the 1973 volume of imported canned mushrooms has stabilized, compared with extremely sharp growth in mid- to late 1972. The July-December import total was 21.4 million pounds, up about 4 percent from the previous year. Temporary uncertainties with the processed product may turn some consumers to the fresh market. The domestic pack of canned mushrooms in 1973/74 probably will be larger as total mushroom production capacity was expected to increase by 11 percent over the previous marketing season.

Fresh mushroom prices to growers are currently averaging $1.80-$1.95 for a four-quart basket offered for sale at Kennett Square, Pennsylvania. One year ago, these prices were about 15 percent higher. Retail prices in January 1974 were similarly lower than a year earlier in most metropolitan markets. For processing, mushroom prices in January were mostly 34 cents per lb. clean cut, firming up from the lows in

mid-fall 1973 but still about 2 cents per lb. lower than January 1973.

DRY EDIBLE BEANS

Despite relatively high prices at planting time, U.S. bean growers did not increase their 1973 acreage, probably because other farming alternatives looked better to them at that time. In fact, U.S. bean acreage declined 1 percent. Furthermore, yields were 6 percent less than in 1972. The crop of 16.8 million cwt. was one of the smaller crops of recent years. White bean production turned up especially short due to an 18 percent lower yield of the important Michigan crop. Colored bean output was 8.1 million cwt., off 6 percent from 1972, although red kidney and pink beans showed individual increases.

The 1973/74 supply of beans is estimated at 17.6 million cwt., 9 percent less than the moderate figure of a year earlier. Expected strong domestic and foreign demand is likely to pull carryover stocks to record lows by September 1974.

Foreign Demand Continues Active

Even though the U.S. supply of beans this market season is less, export activity from September 1 to January 1 was almost 24 percent greater than a year earlier. Shipments have been going to our regular customers in Europe, and in addition to Northern Ireland, and the United Kingdom, and also to Mexico, Brazil, and the Dominican Republic. Demand has boomed in recent months due to short supplies in Latin America plus the effect of two devaluations of the dollar which have made our farm products more attractive buys in world markets. However, the present pace of export activity cannot be maintained as supplies are not large enough to sustain current movement. Exports in the 1972/73 season were 4.3 million cwt., but the 1973/74 figure will more likely be about 3.0 million cwt.

Table 2.—U.S. exports of dried edible beans by country of destination

Country	Marketing year beginning		
	Sept. 1970	Sept. 1971	Sept. 1972
	1,000 cwt.	*1,000 cwt.*	*1,000 cwt.*
United Kingdom	1,192.9	675.8	58.9
Japan	366.9	178.5	234.2
Venezuela	325.0	211.4	112.7
Mexico	286.2	97.0	193.9
France	224.5	282.7	361.5
Netherlands	162.6	225.0	264.4
Dominican Republic	116.4	158.9	113.3
Australia	101.8	77.8	64.5
Algeria	---	208.3	71.1
Other countries	707.4	694.9	2,803.9
Total U.S. exports	3,483.7	2,810.3	4,278.4

World production of dry beans in 1973 was 132.1 million cwt., 4 percent more than a year earlier. This figure does not include the USSR and Eastern European countries. Most of the gain came from Mexico and Brazil, countries that always use nearly all their output domestically. Apparently, these countries were especially concerned about rebuilding stocks and supplies. Elsewhere, production was little changed in 1973. As a result, it seems unlikely that any appreciable new quantities will be offered to world markets during the first half of 1974.

Farm Prices at Unprecedented Highs

The December 15 average price received by farmers for dry beans was an unprecedented $30.20 per cwt., compared with $9.98 a year earlier. The value of the smaller 1973 crop is estimated at $438 million versus $200 million for 1972 and $174 million for 1971. Prices have moved up steadily since the marketing season began. With beans in short supply, and with growers holding their remaining supplies, quotations for many classes are nominal. Dealer prices for pea beans are especially high, as are red kidneys. The last quotes for great northerns were $39.50 per cwt. in mid-January, and pintos were $37.00 and higher at the same time. Baby limas at $28.75 and blackeye peas at $29.50 were the lowest prices quoted for any major class.

These high prices are expected to call forth additional 1974 acreage, but no sharp break in prices is likely before the size of the 1974 crop becomes apparent late this summer.

Government purchases of beans for the needy and for child nutrition programs have been curtailed sharply this season due to the limited quantity available. From July 1, 1973 to January 1, 1974, the Government purchased 28.7 million pounds, compared with 42.7 million pounds a year earlier when supplies were more generous.

DRY PEAS

Excluding seed peas, the 1973 crop was even smaller than the reduced 1972 output—1.7 million cwt. compared with 2.1 million cwt. in 1972 (off 21 percent). The 1973 acreage was slightly larger, but dry weather cut yields sharply in Washington and to a lesser extent in Idaho so that the resulting production fell far short of foreign and domestic demand. These two States account for 95 percent of the U.S. production.

A leading trade source noted that January 1 stocks, excluding lentils and seed stock, were only half as much as a year earlier. This big difference between the production cut and the stocks position suggests heavy disappearance early in the market season. Export data confirm this, and with more than two-

thirds of the U.S. crop traditionally being exported, foreign demand has boosted domestic price levels. Growers were receiving $27.50 per cwt. in December 1973 against $5.40 in December 1972 and $3.02 the same month of 1971. The value of the short 1973 crop was reported $32.6 million against $11.5 million a year earlier.

World dry pea production in 1973—13.1 million cwt.—dropped slightly from 1972. World output in 1972 and 1973 was substantially below each of the 1968-1971 seasons.

Government purchases of peas for the needy and for child nutrition programs during July 1, 1973 to January 1, 1974, came to 2.2 million pounds, compared with 2.3 million last season. Lentil purchases increased to 460,000 pounds, more than double a year earlier.

With supplies very short, and with prices so much higher than ever recorded before, growers are likely to increase 1974 plantings. Furthermore, average yields from the same acreage as in 1973 would bring on a sharply larger crop. Peas and beans are both likely to be attractive alternatives for growers in the Pacific Northwest in 1974.

Table 3.—Beans dry edible: Production by commercial classes, 1968-73

Class	1968	1969	1970	1971	1972	1973[1]
	1,000 cwt.	*1,000 cwt.*	*1,000 cwt.*	*1,000 cwt.*	*1,000 cwt.*	*1,000 cwt.*
White:						
Pea, navy	5,589	7,169	5,180	5,022	6,450	5,149
Great northern	1,386	1,707	1,430	1,517	1,515	1,776
Small white[2]	510	581	342	378	397	421
Yelloweye	49	20	([3])	([3])	([3])	([3])
Total, White	7,534	9,477	6,952	6,917	8,362	7,346
Colored:						
Pink	682	500	678	724	624	804
Pinto	4,727	4,511	5,384	4,843	5,613	4,707
Red kidney	1,124	1,548	1,302	1,123	816	1,079
Small red	354	453	585	371	371	318
Cranberry	184	165	155	112	257	294
Black turtle soup	314	223	227	279	144	120
Total, colored	7,385	7,400	8,331	7,452	7,825	7,322
Lima:						
Large	814	770	558	398	471	533
Baby	589	430	478	400	317	378
Total, lima	1,403	1,200	1,036	798	788	911
Other:						
Blackeye	781	513	712	413	801	766
Garbanzo	58	101	68	85	60	98
Other[4]	274	222	300	252	282	360
Total, other	1,113	836	1,080	750	1,143	1,224
United States	17,435	18,913	17,399	15,917	18,118	16,803

[1] Preliminary. [2] Includes flat small white. [3] Included in "Other". [4] Does not include beans grown for garden seed.

Data from Crop Production, SRS, USDA.

Table 4.—Vegetables and melons for fresh market: Commercial acreage, production, and value for principal crops, 1971, 1972, and 1973[1]

Crop	Harvested acreage			Production			Value					
							Per cwt.			Total		
	1971	1972	1973	1971	1972	1973	1971	1972	1973	1971	1972	1973
	1,000 acres	*1,000 acres*	*1,000 acres*	*1,000 cwt.*	*1,000 cwt.*	*1,000 cwt.*	*Dollars*	*Dollars*	*Dollars*	*1,000 dollars*	*1,000 dollars*	*1,000 dollars*
Artichokes	[2] 11.0	[2] 11.1	[2] 12.0	[2] 792	[2] 710	[2] 600	[2] 9.72	[2] 11.60	[2] 14.50	[2] 7,697	[2] 8,222	[2] 8,699
Asparagus	[2] 114.2	[2] 119.1	[2] 115.4	833	922	860	29.20	26.70	31.10	24,309	24,663	26,765
Beans, snap	83.3	86.4	85.3	3,090	3,123	3,017	14.40	14.80	17.60	44,427	46,366	53,126
Broccoli	[2] 42.5	[2] 47.3	[2] 53.6	1,274	1,375	1,571	14.80	14.50	15.90	18,842	19,436	24,925
Brussels sprouts	5.4	6.1	5.9	621	702	679	12.60	14.40	14.00	7,835	10,112	9,506
Cabbage[3]	96.7	93.8	97.3	19,029	18,431	19,660	3.89	4.01	6.04	74,053	73,990	118,669
Cantaloups[4]	99.0	96.6	93.1	12,255	12,944	11,270	6.54	7.26	8.07	80,168	93,957	90,925
Carrots	[2] 70.8	[2] 74.4	[2] 82.5	11,571	12,513	13,138	7.19	7.22	7.18	83,144	90,368	94,310
Cauliflower	[2] 25.0	[2] 28.1	[2] 30.5	1,274	1,611	1,408	14.50	14.60	16.50	18,420	23,529	23,229
Celery	[2] 33.5	[2] 33.2	[2] 34.1	[2] 15,909	[2] 16,021	[2] 17,075	[2] 5.46	[2] 6.42	[2] 6.23	[2] 86,908	[2] 102,794	[2] 106,389
Corn, sweet	183.1	180.6	175.5	12,542	13,167	13,697	5.84	6.28	6.69	73,244	82,625	91,634
Cucumbers	46.6	49.2	44.0	4,326	4,701	4,304	7.57	8.14	9.12	32,742	38,265	39,237
Eggplant	2.7	3.1	2.8	437	522	523	9.18	8.68	9.56	4,013	4,530	4,998
Escarole	9.1	9.8	8.4	1,155	1,180	1,207	9.10	7.99	11.60	10,513	9,431	14,042
Garlic	3.7	5.1	6.9	481	663	897	9.32	9.84	12.30	4,485	6,525	11,021
Honeydews	12.3	13.2	14.1	2,039	2,307	2,448	6.23	6.24	7.49	12,712	14,390	18,331
Lettuce	216.6	219.7	219.1	47,369	48,640	49,804	6.31	5.73	7.41	298,766	278,736	369,148
Onions	[2] 98.8	[2] 94.5	[2] 104.4	[2] 29,803	[2] 28,355	[2] 29,188	[2] 3.88	[2] 6.48	[2] 7.36	[2] 105,330	[2] 167,715	[2] 193,395
Peppers, green	[2] 47.4	[2] 46.5	[2] 48.0	[2] 3,980	[2] 4,590	[2] 4,718	[2] 12.40	[2] 12.70	[2] 13.80	[2] 49,259	[2] 58,219	[2] 65,002
Spinach	11.0	9.8	10.7	614	585	631	13.60	14.80	14.50	8,341	8,647	9,172
Tomatoes	136.3	145.1	139.1	17,798	19,847	19,379	13.90	14.80	15.80	247,418	294,572	306,178
Watermelons	252.4	268.0	241.3	27,094	25,320	26,260	2.51	2.50	2.95	67,892	63,266	77,465
Total	1,601.4	1,640.7	1,624.0	214,286	218,229	222,334	6.35	6.97	7.90	1,360,518	1,520,358	1,756,166

[1] Includes Hawaii. [2] Includes quantities used for processing. [3] Price computed from value and production less not marketed. [4] Includes Casabas, Persians, and other muskmelons.

Vegetables, Fresh Market, annual summary, SRS, USDA.

Table 5.—Vegetables, fresh: Representative wholesale prices (l.c.l.) sales at Net York and Chicago for stock of generally good quality and condition (U.S. No. 1 when available) indicated periods, 1972, 1973, and 1974

Market, commodity and State of origin	Unit	Tuesday nearest-month					
		1972-73			1973-74		
		Nov. 14	Dec. 12	Jan. 9	Nov. 13	Dec. 11	Jan. 8
		Dollars	*Dollars*	*Dollars*	*Dollars*	*Dollars*	*Dollars*
NEW YORK							
Beans, snap							
Round green type (Florida)	Bu. hamper and crt.	5.75	5.50	11.50	7.25	7.75	12.75
Broccoli, bunched (California)	14's crt.	6.00	6.625	4.50	4.75	6.25	5.25
Cabbage, domestic round type (Florida) .	1-3/4 bu. crt.	---	3.625	3.50	---	3.50	3.00
Cabbage, Danish type (New York)	50-lb. sack	2.50	3.125	3.375	2.75	2.625	2.75
Carrots, toped, washed (California)	48-1-lb. film bag ctn.	7.25	6.75	5.75	5.50	5.25	5.25
Celery, Pascal (Florida)	2-4 doz. 16 in. crt.	---	3.75	7.25	4.00	3.75	4.25
Celery, Pascal (California)	2-3 doz. 16 in. crt.	6.75	5.75	10.00	6.25	5.00	6.00
Corn, sweet, yellow (Florida)	4-1/2-5 doz. crt.	3.50	4.50	5.75	4.25	4.25	6.75
Cucumber, (Florida)	Bu. basket	3.75	5.25	9.00	6.00	7.75	---
Lettuce, Iceberg type (Arizona)	2 doz. ctn.	7.25	5.25	5.75	3.25	4.75	4.00
Onions, yellow, medium (New York) ...	50-lb. sack	4.75	4.85	5.75	4.25	4.50	4.50
Peppers, green, California							
Wonder (Florida)	Bu. basket	6.50	5.25	6.75	9.50	12.00	6.00
Spinach, savoy type (Texas)	Bu. basket	---	4.00	3.875	3.50	4.50	5.25
CHICAGO							
Beans, snap							
Round green type (Florida)	Bu. hamper	6.25	7.50	12.50	7.50	8.50	11.50
Broccoli (California)	14's crt. and ctn.	5.75	6.00	4.50	4.75	5.85	4.75
Cabbage, domestic round type (Texas) ..	1-3/4 bu. crt.	3.30	3.50	3.75	3.25	3.35	3.25
Carrots, topped, washed (California)	48-1-lb. film bag, mesh master	---	6.00	5.35	---	4.25	5.00
Cauliflower (California)	Film wrapped 12's ctn.	4.75	7.00	6.40	7.25	6.50	6.75
Celery, Pascal type (California)	2-3 doz. 16 in. crt.	6.75	5.75	8.50	6.00	4.25	5.25
Corn, sweet, yellow (Florida)	5 doz. crt.	3.60	4.75	5.50	4.00	4.25	6.50
Cucumbers (Florida)	Bu. basket	4.00	---	---	6.50	---	---
Lettuce, Iceberg type (Arizona)	2 doz. heads, ctn.	7.25	5.00	5.50	4.00	4.75	3.75
Onions, yellow, large (Idaho)	50 lb. sack	4.40	4.50	5.25	5.25	5.00	5.50
Onions, yellow, medium (Midwestern) ..	50 lb. sack	4.25	4.15	4.50	4.00	4.25	4.25
Peppers, green, California Wonder							
type, large (Florida)	Bu. basket	8.00	6.25	11.00	10.00	12.50	6.75
Tomatoes, greenhouse, medium							
(Midwestern)	8 lb. Bu. basket	2.75	2.75	---	3.50	3.00	---

Weekly summary of terminal market prices, AMS, USDA, Market News Report.

Table 6.—Vegetables, fresh: Average f.o.b. shipping point prices, per hundredweight, United States, indicated periods, 1972 and 1973

Commodity	1972		1973		
	November	December	October	November	December 1-15
	Dollars	*Dollars*	*Dollars*	*Dollars*	*Dollars*
Beans, snap	15.50	18.80	14.80	15.30	18.40
Broccoli	14.90	17.70	14.80	15.10	17.00
Cabbage	3.95	4.05	5.93	4.79	4.02
Cantaloups	4.90	---	6.45	8.72	---
Carrots	8.11	7.23	7.18	6.79	5.92
Cauliflower	13.60	18.40	14.00	14.40	20.00
Celery	6.54	6.26	4.34	5.09	4.30
Corn, sweet	5.91	6.31	8.17	7.20	6.31
Cucumbers	5.61	6.33	12.10	7.93	9.49
Lettuce	8.85	7.05	4.36	3.93	5.36
Onions	6.53	6.91	6.14	6.97	7.23
Peppers, green	14.00	13.80	14.40	37.30	23.90
Spinach	13.90	13.30	15.40	15.90	14.50
Tomatoes	19.20	15.50	13.20	15.60	14.20

[1] Agricultural Prices, SRS, USDA, issued monthly.

Table 7.—Vegetables, commercial for fresh market: Index numbers (unadjusted) of prices received by farmers, as of 15th of the month, United States, by months[1]

(1967=100)

Period	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.	Average
1935-39	35	37	40	40	39	30	27	25	25	28	32	36	33
1947-49	89	94	96	95	85	66	64	60	59	63	74	76	77
1950-54	87	82	78	91	82	75	72	62	57	66	77	83	76
1955-59	83	90	91	89	84	77	72	63	64	70	78	79	78
Year													
1960	99	95	87	88	90	74	76	62	61	67	73	77	79
1961	74	74	76	95	83	90	81	65	65	65	76	74	76
1962	94	102	125	109	107	84	73	63	64	66	75	85	87
1963	102	95	82	83	78	88	85	65	62	70	91	94	83
1964	100	103	98	89	83	90	80	76	76	78	101	87	88
1965	80	86	101	106	121	102	85	78	78	84	90	88	92
1966	106	112	102	109	97	99	114	101	91	91	103	99	102
1967	103	99	98	108	103	121	110	86	82	88	100	103	100
1968	118	123	127	132	108	98	94	88	92	91	115	119	109
1969	107	111	109	107	121	100	100	96	94	110	144	132	111
1970	134	130	125	112	124	113	103	95	107	96	105	100	112
1971	114	123	149	143	129	128	121	104	101	118	166	137	128
1972	153	132	118	135	127	126	121	128	131	116	145	136	131
1973[2]	175	168	177	202	181	188	188	146	126	127	139	132	162

[1] The index for commercial fresh market vegetables was revised, beginning January 1958, to reflect changes in the method of reporting prices. All prices now are reported on a f.o.b. basis. [2] Preliminary.

Agricultural Prices, SRS, USDA, issued monthly.

Table 8.—Vegetables for commercial processing: Acreage, production and season average price per ton, 1971, 1972, and 1973.

Commodity	Harvested acreage			Production			Price per ton		
	1971	1972	1973	1971	1972	1973	1971	1972	1973
	1,000 acres	*1,000 acres*	*1,000 acres*	*1,000 tons*	*1,000 tons*	*1,000 tons*	*Dollars*	*Dollars*	*Dollars*
Asparagus	84	87	N.A.	98	98	84	406.00	439.00	471.00
Beans, lima[1]									
Canning	27	26	28	26	22	26	153.00	154.00	170.00
Freezing	44	48	50	55	69	72	201.00	225.00	226.00
Beans, snap									
Canning	184	194	218	457	462	547	90.50	98.10	102.00
Freezing	56	62	74	140	151	194	99.50	107.00	111.00
Beets	14	13	16	190	165	201	21.40	23.70	28.70
Cabbage for kraut	11	11	13	235	198	218	17.50	21.40	24.70
Corn, sweet[2]									
Canning	323	315	325	1,541	1,512	1,469	23.70	25.00	27.40
Freezing	100	114	128	506	602	699	25.90	27.80	34.40
Cucumbers for pickles	128	129	129	563	571	609	93.20	94.00	99.10
Peas, green[1]									
Canning	258	248	267	330	328	294	109.00	113.00	117.00
Freezing	125	130	146	190	184	198	105.00	111.00	122.00
Spinach									
Canning	14	14	14	79	79	79	43.70	45.60	50.30
Freezing	12	13	13	82	85	92	42.90	44.20	49.60
Tomatoes	255	261	292	5,516	5,804	5,935	35.50	35.20	42.00
Broccoli	N.A.	N.A.	N.A.	94	113	91	176.00	172.00	187.00
Carrots	N.A.	N.A.	N.A.	360	352	436	30.50	28.70	30.30
Cauliflower	N.A.	N.A.	N.A.	59	69	62	113.00	116.00	144.00
Total[3]	N.A.	N.A.	N.A.	10,519	10,865	11,306	48.80	50.40	55.60

[1] Production and price on a "shelled" basis. [2] Corn in the husk. [3] May not add to total due to rounding.

Vegetable—Processing, annual summary, SRS, USDA.

Table 9.—Vegetables, frozen: Cold storage holdings and indicated disappearance, September 1 to December 31

Commodity	December 31			September 1-December 31 net change		
	1971	1972	1973[1]	1971	1972	1973[1]
	Million pounds	*Million pounds*	*Million pounds*	*Million pounds*	*Million pounds*	*Million pounds*
Asparagus	11	22	17	-7	-10	-10
Beans, lima:						
Forkhook	31	34	27	4	10	10
Baby	57	54	61	21	28	37
Total	88	88	88	25	38	47
Beans, snap:						
Regular	88	98	112	-30	-23	-30
French style	46	51	54	-13	-7	-7
Total	134	149	166	-43	-30	-37
Broccoli:						
Spears	N.A.	49	39	N.A.	([3])	7
Chopped and cuts	N.A.	38	32	N.A.	2	3
Total	64	87	71	-2	2	10
Brussels sprouts	35	46	51	24	30	34
Carrots	99	97	116	52	63	86
Cauliflower	32	49	64	15	29	46
Corn, sweet:						
cut	149	166	182	42	71	80
on-cob	70	86	98	41	39	51
Total	219	252	280	83	110	131
Mixed vegetables	31	30	23	5	5	10
Okra	N.A.	17	20	N.A.	-5	-1
Onions						
Rings	N.A.	N.A.	9	N.A.	N.A.	1
Other	N.A.	N.A.	12	N.A.	N.A.	5
Total	N.A.	N.A.	21	N.A.	N.A.	6
Peas, blackeyed	N.A.	12	12	N.A.	2	7
Peas, green	210	168	178	-123	-118	-111
Peas and carrots	13	12	9	2	2	2
Spinach	44	49	65	-31	-23	-18
Southern greens	N.A.	46	37	N.A.	7	5
Other vegetables	260	199	171	25	9	31
Total vegetables[2]	1,240	1,323	1,390	24	110	239
Potatoes:						
French fried	572	594	451	251	246	258
Other potato products	87	83	95	28	17	43
Total frozen potatoes[2]	659	677	546	278	263	301
Grand Total[2]	1,899	2,000	1,936	303	373	539

[1] Preliminary. [2] May not add to total due to rounding. N.A.-Not available. [3] Less than .50.

Cold storage, SRS, USDA, issued monthly.

Table 10.—Fresh Vegetables: Retail price, marketing margin, and farm value per unit, sold in New York City, indicated months, 1972 and 1973

Commodity, month, and retail unit	Retail price	Marketing Margin		Farm Value[1, 2]	
		Absolute	Percentage of retail value	Absolute	Percentage of retail value
	Cents	*Cents*	*Percent*	*Cents*	*Percent*
Carrots (Pound)					
November 1973	21.6	14.1	65	7.5	35
October 1973	25.4	14.7	58	10.7	42
November 1972	23.4	13.7	59	9.7	41
Celery (Pound)					
November 1973	22.2	16.8	76	5.4	24
October 1973	22.9	18.1	79	4.8	21
November 1972	23.2	17.1	74	6.1	26
Lettuce (Head)					
November 1973	40.8	32.8	80	8.0	20
October 1973	41.1	32.8	80	8.3	20
November 1972	42.5	25.4	60	17.1	40
Onions, dry yellow (Pound)					
November 1973	19.7	12.1	61	7.6	39
October 1973	18.0	10.7	59	7.3	41
November 1972	20.2	10.7	53	9.5	47
Potatoes, round white (Pound)					
November 1973	14.7	7.9	54	6.8	46
October 1973	13.5	7.8	58	5.7	42
November 1972	11.1	6.1	55	5.0	45
Potatoes, Russet (Pound)					
November 1973	19.4	12.1	62	7.3	38
October 1973	19.1	12.7	66	6.4	34
November 1972	15.0	10.0	67	5.0	33
Sweetpotatoes (Pound)					
November 1973	25.1	11.1	44	14.0	56
October 1973	25.4	13.5	53	11.9	47
November 1972	22.1	12.4	56	9.7	44

[1] For quantity of product equivalent to retail unit sold to consumers: Because of waste and spoilage during marketing, equivalent quantity exceeds retail unit. [2] Production areas: Carrots-California, Celery-California, Lettuce-California, Onions-Texas, Potatoes, round white-New York, Potatoes, Russet-Idaho; Sweetpotatoes-Louisiana.

Table 11.—Potatoes, Irish: Acreage, yield per acre, and production, 1971, 1972, and 1973

Seasonal group	Harvested acreage			Yield per acre			Production		
	1971	1972	1973[1]	1971	1972	1973[1]	1971	1972	1973[1]
	1,000 acres	*1,000 acres*	*1,000 acres*	*Cwt.*	*Cwt.*	*Cwt.*	*1,000 cwt.*	*1,000 cwt.*	*1,000 cwt.*
Winter	18.0	15.4	14.0	172	151	204	3,088	2,327	2,853
Spring	107.3	95.8	98.9	220	219	214	23,658	21,011	21,213
Summer	145.8	130.9	124.5	178	182	171	25,922	23,776	21,253
Fall									
8 Eastern	262.0	223.9	233.2	245	230	211	64,229	51,431	49,140
8 Central	336.4	300.2	317.6	186	183	177	62,477	55,029	56,071
8 Western	521.8	487.6	514.9	268	292	285	139,980	142,381	146,822
Total, fall	1,120.2	1,011.7	1,065.7	238	246	236	266,686	248,841	252,033
United States	1,391.3	1,253.8	1,303.1	230	236	228	319,354	295,955	297,352

[1] Preliminary.

Crop Production, annual summary, SRS.

Table 12.—Sweetpotatoes: Acreage, yield per acre, and production, 1971, 1972, and 1973

Group and State	Harvested acreage			Yield per acre			Production		
	1971	1972	1973[1]	1971	1972	1973[1]	1971	1972	1973[1]
	1,000 acres	*1,000 acres*	*1,000 acres*	*Cwt.*	*Cwt.*	*Cwt.*	*1,000 cwt.*	*1,000 cwt.*	*1,000 cwt.*
Central Atlantic[2]	10.7	10.5	11.1	135	124	138	1,447	1,298	1,535
Lower Atlantic[3]	32.8	34.0	34.5	126	137	127	4,148	4,660	4,385
Central[4]	64.4	64.1	61.2	85	90	91	5,496	5,741	5,591
California	5.7	5.8	6.4	110	130	135	627	754	864
United States	113.6	114.4	113.2	103	109	109	11,718	12,453	12,375

[1] Preliminary. [2] New Jersey, Maryland, and Virginia. [3] North Carolina, South Carolina, and Georgia. [4] Tennessee, Alabama, Mississippi. Arkansas, Louisiana, and Texas.

Crop Production, annual summary, SRS, USDA.

Table 13.—Potatoes: Prices f.o.b. shipping points per hundredweight, U.S. No. 1 grade or better, indicated periods, 1972, 1973 and 1974

Shipping point and variety	1972-73			1973-74		
	November 18	December 16	January 6	November 17	December 15	January 12
	Dollars	*Dollars*	*Dollars*	*Dollars*	*Dollars*	*Dollars*
Maine						
Round whites	3.20	3.32	4.72	5.60	5.68	7.02
Long Island, New York						
Round whites	4.36	4.40	5.36	6.76	6.78	7.92
New York, Upstate						
Round whites	4.64	4.60	5.94	6.64	6.88	8.08
Michigan						
Round whites	4.04	3.80	4.50	6.20	6.36	7.04
Wisconsin						
Round whites	3.58	3.50	3.91	5.58	5.55	---
Washington						
Russetts	4.29	4.00	4.25	---	---	7.28
Colorado						
Reds	3.75	3.75	4.00	5.12	5.12	5.90
Idaho						
Russets 2" or 4 oz. min. ..	4.81	---	5.12	7.50	7.12	---

F.O.B. prices are simple averages of the range of daily prices for the week ended on indicated date.

Compiled from Market News Service reports.

Table 14.—Canned Vegetables: Commercial pack and canners' seasonal supply, shipments to January 1, stocks January 1, and total seasonal shipments, selected commodities

Commodity and season	Carryover	Pack	Seasonal supply	Shipments to January 1	Stocks January 1	Total seasonal shipments
	Mil. cases 24/303's	*Mil. cases 24/303's*	*Mil. cases 24/303's*	*Mil. cases 24/303's*	*Mil. cases 24/303's*	*Mil. cases 24/303's*
Beans, lima						
1970-71	1.3	2.8	4.1	1.5	2.6	3.4
1971-72	.7	3.1	3.8	1.4	2.4	3.1
1972-73	.7	2.1	2.8	1.3	1.5	2.7
1973-74	.1	3.2	3.3	N.A.	N.A.	N.A.
Beans, snap						
1970-71	10.7	47.6	58.3	26.8	31.5	50.3
1971-72	8.0	50.0	58.0	28.2	29.8	52.1
1972-73	5.9	47.6	53.5	28.5	25.0	50.8
1973-74	2.7	[2] 54.2	[2] 56.9	N.A.	N.A.	N.A.
Corn, sweet						
1970-71	9.3	47.0	56.3	20.2	36.1	49.3
1971-72	7.0	53.8	60.8	23.8	37.0	54.1
1972-73	6.7	53.0	59.7	25.2	34.5	56.5
1973-74	3.2	55.2	58.4	N.A.	N.A.	N.A.
Peas, green						
1970-71	6.3	28.7	35.0	17.9	17.1	30.7
1971-72	4.3	33.2	37.5	19.2	18.3	32.6
1972-73	4.9	33.1	38.0	19.2	18.8	34.4
1973-74	3.6	29.6	33.2	N.A.	N.A.	N.A.

[1] Does not include late fall pack in Florida and Texas. [2] January 1 thru November 1. N.A.—Not available.

National Canners Association.

Table 15.—Sweetpotatoes: Prices f.o.b. shipping points and wholesale price at New York and Chicago, indicated periods, 1972, 1973, and 1974

Item	State	Week ended 1972-73 Nov. 18	Dec. 16	Jan. 6	1973-74 Nov. 17	Dec. 15	Jan. 12
		Dollars	*Dollars*	*Dollars*	*Dollars*	*Dollars*	*Dollars*
F.O.B. shipping points, Porto Rico, cured (U.S. No. 1 50 lb. crt.)	S.W. Louisiana	5.62	5.68	5.62	7.75	7.75	7.52
Porto Rico, cured (crt., ctn., and bu. bkt.)	Eastern N. Carolina	5.00	5.00	4.88	7.00	7.00	7.00
		Tuesday nearest mid-month 1972-73 Nov. 14	Dec. 12	Jan. 9	1973-74 Nov. 13	Dec. 11	Jan. 8
		Dollars	*Dollars*	*Dollars*	*Dollars*	*Dollars*	*Dollars*
Terminal markets							
New York							
Porto Rico (50 lb. ctn.)	N. Carolina	5.75	5.75	5.75	8.00	7.25	7.85
Chicago							
Porto Rico cured (50 lb. crt.)	Louisiana	---	6.50	6.75	9.00	8.75	8.75

F.o.b. prices are simple averages of the range of daily prices, compiled from Market News Service reports. The market prices are representative prices for Tuesday of each week and are submitted by the Market News Service representative at each market.

Table 16.—United States average prices received by farmers per hundredweight for important field crops, indicated periods, 1972 and 1973

Commodity	1972 Dec. 15	1973 Oct. 15	1973 Nov. 15	1973 Dec. 15
	Dollars	*Dollars*	*Dollars*	*Dollars*
Potatoes	2.76	2.77	3.32	3.73
Sweetpotatoes	6.66	5.92	7.00	8.11
Beans, dry edible	9.98	22.60	27.00	30.20
Peas, dry field	5.40	24.00	28.20	27.50

Agricultural Prices, SRS, USDA, issued monthly.

Table 17.—Beans, dry edible: Acreage, yield per acre, and production, 1971, 1972, and 1973[1]

States and classes	Harvested acreage 1971	1972	1973	Yield per acre 1971	1972	1973	Production[2] 1971	1972	1973
	1,000 acres	*1,000 acres*	*1,000 acres*	*Pounds*	*Pounds*	*Pounds*	*1,000 cwt.*	*1,000 cwt.*	*1,000 cwt.*
Michigan	570	605	590	990	1,180	970	5,643	7,139	5,723
New York	62	36	39	1,280	850	950	794	306	371
Northwest[3]	308	387	389	1,739	1,648	1,620	5,357	6,380	6,303
Southwest[4]	228	217	211	869	845	804	1,982	1,833	1,698
California									
Large lima	25	26	31	1,590	1,810	1,720	398	471	533
Baby lima	22	18	20	1,820	1,760	1,890	400	317	378
Other	101	113	110	1,330	1,480	1,634	1,343	1,672	1,797
Total California	148	157	161	1,447	1,567	1,681	2,141	2,460	2,708
United States[a]	1,316	1,402	1,390	1,209	1,292	1,209	15,917	18,118	16,803

[1] Includes beans grown for seed. [2] Cleaned basis. [3] Nebraska, Montana, Idaho, Wyoming, Washington, Minnesota, and North Dakota.
[4] Kansas, Colorado, New Mexico, and Utah.

Crop production, annual summary, SRS, USDA.

Table 18.—Beans, dry edible: Production in selected States, by major types, United States, 1973 and total by types 1972

Type	Michigan	Idaho	Wyoming	Nebraska	Washington	Colorado	New York	California	Other[1]	Total 1973	Total 1972
	1,000 cwt.	*1,000 cwt.*	*1,000 cwt.*	*1,000 cwt.*	*1,000 cwt.*	*1,000 cwt.*	*1,000 cwt.*	*1,000 cwt.*	*1,000 cwt.*	*1,000 cwt.*	*1,000 cwt.*
Peas, navy	4,907								242	5,149	6,450
Great northern ...		509	87	1,147					33	1,776	1,515
Pinto	104	706	305	451	55	1,537			1,549	4,707	5,613
Red kidney	343	74					210	431	21	1,079	816
Small red		179			139					318	371
Large lima								533		533	471
Baby lima								378		378	317
Small white[2]					83			338		421	397
Blackeye								766		766	801
Other	369	651		66	47	5	161	262	115	1,676	1,367
U.S. Total	5,723	2,119	392	1,664	324	1,542	371	2,708	1,960	16,803	18,118

[1] Includes Kansas, Minnesota, Montana, New Mexico, North Dakota, and Utah. [2] Includes flat small white.

Crop Production, annual summary, SRS, USDA.

Table 19.—Peas, dry field: Acreage, yield per acre, and production 1971, 1972, and 1973[1]

State	Harvested acreage			Yield per acre			Production		
	1971	1972	1973	1971	1972	1973	1971	1972	1973
	1,000 acres	*1,000 acres*	*1,000 acres*	*Pounds*	*Pounds*	*Pounds*	*1,000 cwt.*	*1,000 cwt.*	*1,000 cwt.*
Minnesota	7	6	4	1,600	1,300	1,300	112	78	52
North Dakota	3	1.2	---	1,350	1,500	---	41	18	---
Idaho	78	50	48	1,897	1,500	1,300	1,480	750	624
Washington	109	74	81	2,020	1,610	1,180	2,202	1,191	956
Oregon	5.7	3.9	3.4	1,665	1,690	970	95	66	33
United States	202.7	135.1	136.4	1,939	1,557	1,221	3,930	2,103	1,665

[1] Includes peas grown for seed and cannery peas harvested dry.

Crop Production, annual summary, SRS, USDA.

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